Grain Transportation Report

A weekly publication of the
Transportation and Marketing Programs/Transportation Services Branch
www.ams.usda.gov/tmdtsb/grain

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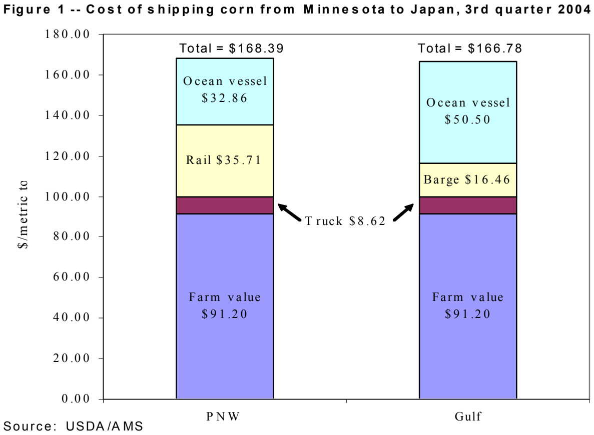
Contents

The next release is Nov. 18, '04

Grain Transportation Update. Grain transportation demand continues to be constrained by late harvests and producers holding corn and soybean crops for higher prices. The 4-week average grain car loadings on U.S. Class I railroads have been below the 3-year average for the last 4 weeks (figure 3 inside). Shippers report that some railroads are nearly 3 weeks behind on empty rail car placements. Barge grain movements also remain weak. Grain volume on the Upper Mississippi, Ohio, and Arkansas Rivers for the week ending October 30 was down 34 percent from last year and 39 percent from the prior 3-year average (see figure 7 and table 9 inside). Rail deliveries of grain to the Pacific Northwest (PNW) and Mississippi River ports continue to surge; rail deliveries of grain to Mexico and to the Texas Gulf ports remain steady (see figure 2 inside). Canadian Pacific reports completion of track improvements that are expected to allow it to haul 20 percent more ND and MN grain (about 2 million bushels/month) to PNW ports beginning this month. Freight rates for all transportation modes (rail, barge, truck, and ocean) are expected to continue increasing due to higher fuel costs and lack of capacity to handle increased transportation demand for all commodities. Cumulative market year-to-date soybean exports are up 10 percent, compared with the same time last year; market year-to-date corn and wheat exports are about the same as last year (see table 12 inside). Marvin.Prater@USDA.gov

The cost of transporting corn from the U.S. to Japan varies from last quarter. In the 3rd quarter of 2004, the total cost of shipping corn from Minneapolis, MN, to Japan through the PNW increased to $77.19, while the total landed cost is $168.39 (figure 1, and table 1). From Minneapolis, MN, to Japan through the Gulf of Mexico (Gulf), the total cost of shipping corn decreased to $75.58 while the total landed cost is $166.78 (figure 1, table 2). The total landed cost (converted to metric tons) includes the farm value of corn plus truck, rail, barge, and ocean vessel (freight) rates.

Figure 1 -- Cost of shipping corn from Minnesota to Japan, 3rd quarter 2004



Source: USDA/AMS

The cost of trucking has increased by 3.4 percent from the 2nd quarter 2004. Truck highway diesel price for the 3rd quarter of 2004 is $1.83 per gallon, an increase of 6.4 percent from last quarter and 25.1 percent from 3rd quarter last year. The increase in price is attributed to crude oil prices, which remain near $50 per barrel.

Table 1--Quarterly PNW modal comparisons

	2004 3rd Qtr	2004 2nd Qtr	Percent change
	$/metric ton		
Truck	$8.62	$8.34	3.4
Rail	$35.71	$35.71	0.0
Ocean vessel	$32.86	$33.02	-0.5
Total	$77.19	$77.07	0.2

Barge rates from the Twin Cities (Minneapolis-St. Paul, MN) to New Orleans, LA, have increased by 29.1 percent from 2nd quarter 2004 (table 2). Barge rates have increased due to a combination of anticipated demand for grain exports and increased demand for using covered barges to move imported non-grain commodities, such as steel.

Table 2--Quarterly Gulf modal comparisons

	2004 3rd Qtr	2004 2nd Qtr	Percent change
	$/metric ton		
Truck	$8.62	$8.34	3.4
Barge	$16.46	$12.75	29.1
Ocean vessel	$50.50	$56.59	-10.8
Total	$75.58	$77.68	-2.7

Finally, although ocean freight costs have decreased compared to the 2nd quarter, they have been increasing since late June 2004. Due to the increase in ocean freight rates, some shipping companies have delayed scrapping older ships and launched new vessels so they can carry more goods. However, this increase in supply capacity may lower future shipping rates, which may be beneficial to shippers. *Conversion factors are available upon request. Calculation differences may be the result of rounding.* Karla.Martin@usda.gov

Grain Transportation Indicators

Table 1--Grain transport cost indicators*

	Truck	Rail	Barge	Ocean	
Week ending				Gulf	Pacific
11/10/04	145	363	206	272	277
Compared with last week	↓	↑	↑	↑	↓

*Indicator: Base year 2000 = 100; Weekly updates include truck = diesel ($/gallon); rail = nearby secondary rail market ($/car); barge = spot Illinois River basis (index = percent of tariff rate); and ocean = routes to Japan ($/metric ton)

Source: Transportation & Marketing Programs/AMS/USDA

Table 2--Market update: U.S. origins to export position price spreads ($/bushel)

Commodity	Origin--destination	11/5/2004	10/29/2004
Corn	IL--Gulf	-0.65	-0.66
Corn	NE--Gulf	-0.59	-0.52
Soybean	IA--Gulf	-0.87	-0.84
HRW	KS--Gulf	-0.98	-0.95
HRS	ND--Portland	-1.51	-1.56

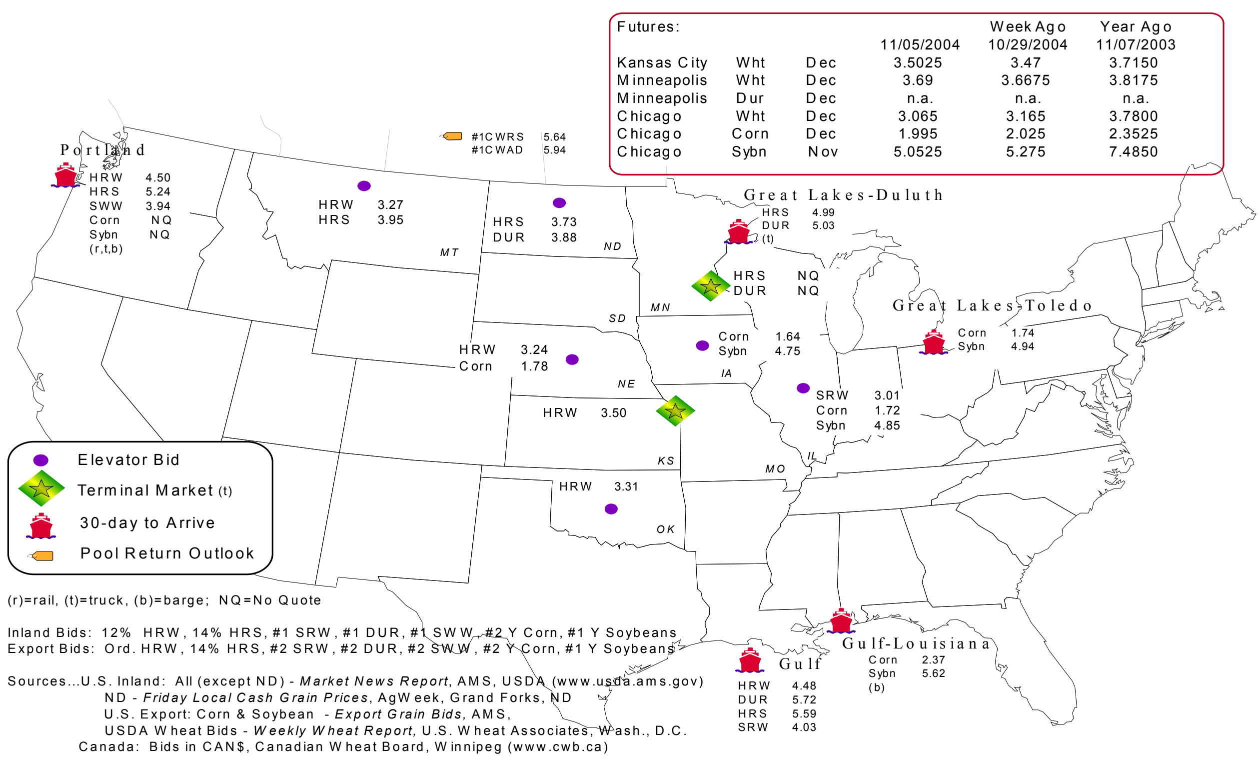
Note: nq = no quote

Source: Transportation & Marketing Programs/AMS/USDA

The **grain bid summary** illustrates the market relationships for commodities. Positive and negative adjustments in differential between terminal and futures markets, and the relationship to inland market points, are indicators of changes in fundamental market supply and demand. The map may be used to monitor market and time differentials.

Figure 1

Grain bid summary



Rail Transportation

Table 3--Rail deliveries to port (carloads)*

Week ending	Mississippi Gulf	Texas Gulf	Cross-Border Mexico	Pacific Northwest	Atlantic & East Gulf	Total
11/03/2004 [p]	345	1,106	1,502	4,501	478	7,932
10/27/2004 [r]	560	1,588	1,438	5,104	534	9,224
2004 YTD	8,478	81,085	51,605	172,834	6,941	320,943
2003 YTD	13,361	70,525	38,031	126,360	14,103	262,380
2004 as % of 2003	63	115	136	137	49	122
Total 2003**	14,843	88,194	48,805	157,125	20,509	329,476
Total 2002	12,247	83,945	40,867	110,471	20,938	268,468

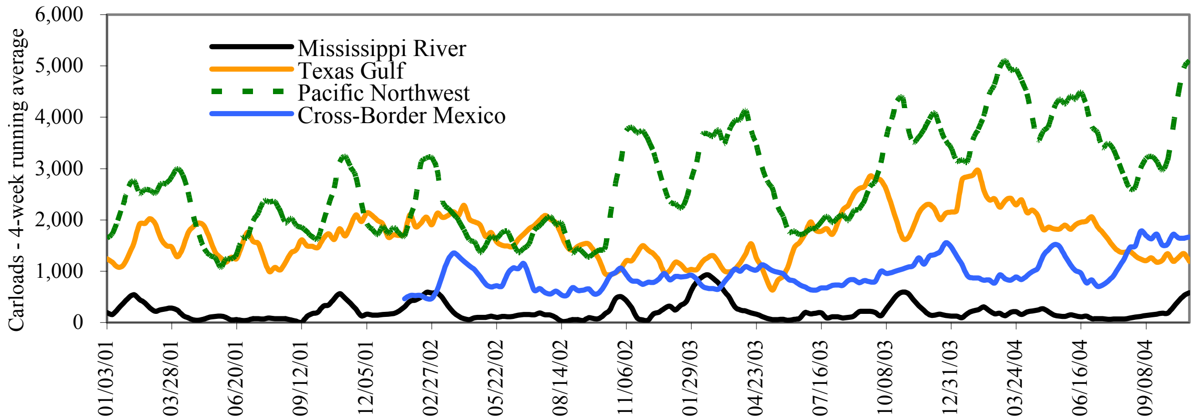
(*) Incomplete Data, as of 9/22/04, Cross-Border movements included; (**) Excludes 53rd week;YTD = year-to-date; p = preliminary data; r = revised data

Source: Transportation & Marketing Programs/AMS/USDA

Railroads originate approximately 40 percent of U.S. grain shipments. Trends in these loadings are indicative of market conditions and expectations.

Figure 2

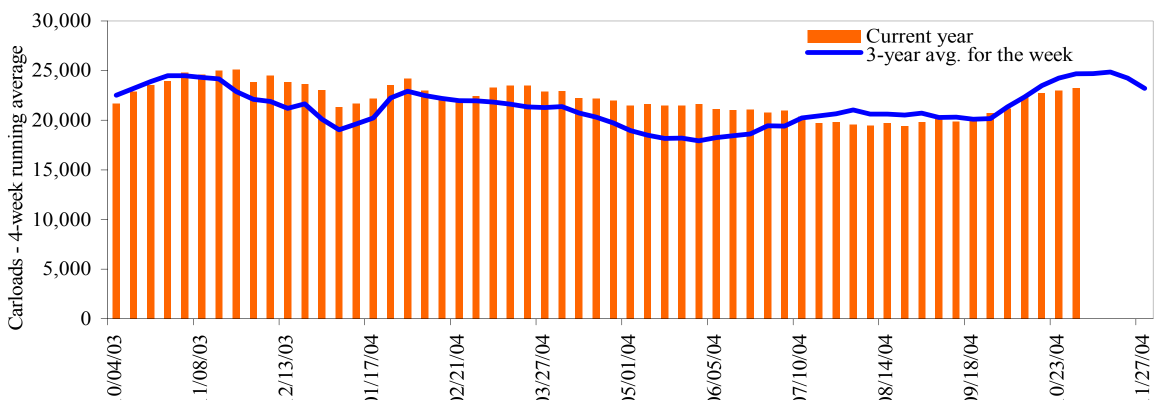
Rail deliveries to port



Source: Transportation & Marketing Programs/AMS/USDA

Figure 3

Total weekly U.S. grain car loadings for Class I railroads



Source: Association of American Railroads

Table 4--Class I rail carrier grain car bulletin (grain carloads originated)

	East		West			U.S. total	Canada	
Week ending	CSXT	NS	BNSF	KCS	UP		CN	CP
10/30/04	3,461	3,453	8,817	618	6,658	23,007	5,056	4,918
This week last year	3,721	4,222	9,870	639	7,268	25,720	4,676	4,848
2004 YTD	117,542	139,462	375,819	23,019	276,423	932,265	194,434	169,792
2003 YTD	118,373	139,702	332,949	18,640	278,527	888,191	157,053	159,995
2004 as % of 2003	99	100	113	123	99	105	124	106
Total 2003*	146,395	171,260	416,371	24,506	336,079	1,094,611	197,993	198,185

Source: Association of American Railroads (www.aar.org); YTD = year-to-date; * Excludes 53rd week

Table 5--Rail car auction offerings, week ending 11/6/04 ($/car)*

Delivery for:	Dec. 04	Jan. 05	Feb. 05
BNSF[1]			
COT/N. grain	$235	$160	$156
COT/S. grain	$232	$173	$173
UP[2]			
GCAS/Region 1	no offer	$241	no offer
GCAS/Region 2	no offer	$249	no offer

*Average premium/discount to tariff, last auction

[1]BNSF - COT = Certificate of Transportation

N includes: ID, MN, MT, ND, OR, SD, WA, WI, WY, and Manitoba, Canada.

S includes: CO, IA, IL, KS, MO, NE, OK, TX, NM, AZ, CA, UT, and NV.

[2]UP - GCAS = Grain Car Allocation System

Region 1 includes: AR, IL, LA, MO, NM, OK, TX, WI, and Duluth, MN.

Region 2 includes: CO, IA, KS, MN, NE, WY, and Kansas City and St. Joseph, MO.

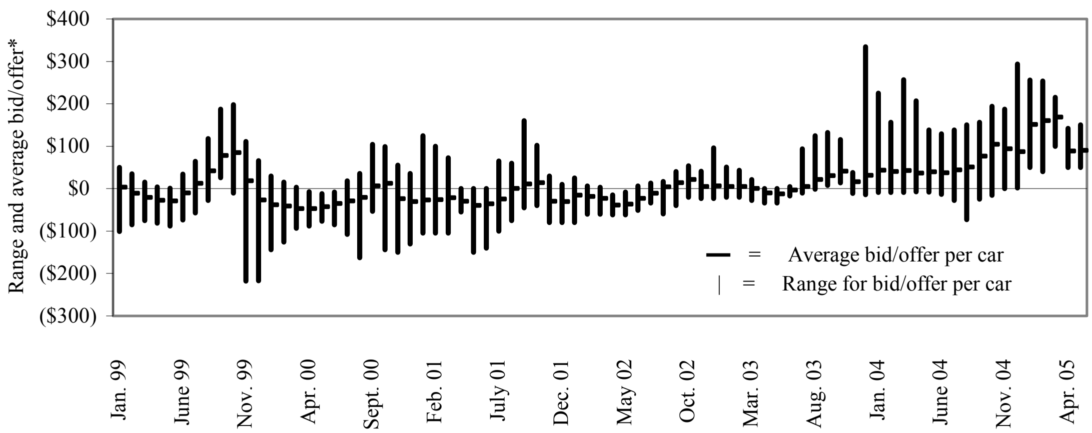
Source: Transportation & Marketing Programs/AMS/USDA

Rail service may be ordered directly from the railroad via **auction** for guaranteed service or tariff for nonguaranteed service or through the secondary market.

The **secondary rail market** information reflects trade values for service that was originally purchased from the railroad carrier as some form of guaranteed freight. The **auction and secondary rail** values are indicators of rail service quality and demand/supply.

Figure 4

Secondary rail car market, delivery month-year



*up to 6 months of trading

Source: Transportation & Marketing Programs/AMS/USDA

Average bid/offer is the simple average of all the weekly bids/offers over the entire period (up to 6 months) for guaranteed railcars that are traded for delivery in a particular month.

Range for bid/offer shows the range of average weekly bids/offers over the entire period (up to 6 months) for guaranteed railcars that are traded for delivery in a particular month.

Table 6--Weekly secondary rail car market, week ending 11/5/04 ($/car)*

	Delivery period			
	Dec. 04	**Jan. 05**	**Feb. 05**	**Mar. 05**
BNSF-GF	$242	$188	$225	$200
Change from last week	$36	$13	$125	$100
UP-Pool	$294	$256	$254	$215
Change from last week	$61	$81	$54	$15

*Average premium/discount to tariff, $/car-last week

Note: Bids listed are market INDICATORS only & are NOT guaranteed prices,
Missing value = no bid quoted; GF = guaranteed freight; Pool = guaranteed pool

Sources: Transportation and Marketing Programs/AMS/USDA

Data from Atwood/ConAgra, Harvest States Co-op, James B. Joiner Co., Tradewest Brokerage Co.

Table 7--Tariff rail rates for unit and shuttle train shipments*

Effective date: 11/1/2004	Origin	Destination	Rate/car	Rate/metric ton	Rate/bushel**
Unit train*					
Wheat	Minneapolis, MN	Houston, TX	$2,120	$23.37	$0.64
	Kansas City, MO	Galveston, TX	$1,920	$21.16	$0.58
	Minneapolis, MN	Portland, OR	$4,148	$45.72	$1.24
	St. Louis, MO	Houston, TX	$2,095	$23.09	$0.63
	Kansas City, MO	Laredo, TX	$2,380	$26.23	$0.71
	Chicago, IL	Albany, NY	$1,834	$20.22	$0.55
	Chicago, IL	Richmond, VA	$2,002	$22.07	$0.60
Corn	Minneapolis, MN	Portland, OR	$3,600	$39.68	$1.01
	Chicago, IL	Baton Rouge, LA	$2,736	$30.16	$0.77
	Council Bluffs, IA	Baton Rouge, LA	$2,270	$25.02	$0.64
	Evansville, IN	Raleigh, NC	$1,791	$19.74	$0.50
	Council Bluffs, IA	Stockton, CA	$3,606	$39.75	$1.01
	Kansas City, MO	Dalhart, TX	$1,965	$21.66	$0.55
	Columbus, OH	Raleigh, NC	$1,700	$18.74	$0.48
	Des Moines, IA	Laredo, TX	$2,930	$32.30	$0.82
Soybeans	Minneapolis, MN	Portland, OR	$3,610	$39.79	$1.08
	Chicago, IL	Baton Rouge, LA	$2,736	$30.16	$0.82
	Council Bluffs, IA	Baton Rouge, LA	$2,799	$30.85	$0.84
	Des Moines, IA	Laredo, TX	$2,930	$32.30	$0.88
	Evansville, IN	Raleigh, NC	$1,791	$19.74	$0.54
	Chicago, IL	Raleigh, NC	$2,391	$26.36	$0.72
Shuttle Train*					
Wheat	St. Louis, MO	Houston, TX	$1,895	$20.89	$0.57
	Minneapolis, MN	Portland, OR	$3,993	$44.01	$1.20
Corn	Fremont, NE	Houston, TX	$2,665	$29.38	$0.75
	Minneapolis, MN	Portland, OR	$3,450	$38.03	$0.97
Soybeans	Council Bluffs, IA	Houston, TX	$2,605	$28.71	$0.73
	Minneapolis, MN	Portland, OR	$3,410	$37.59	$0.95

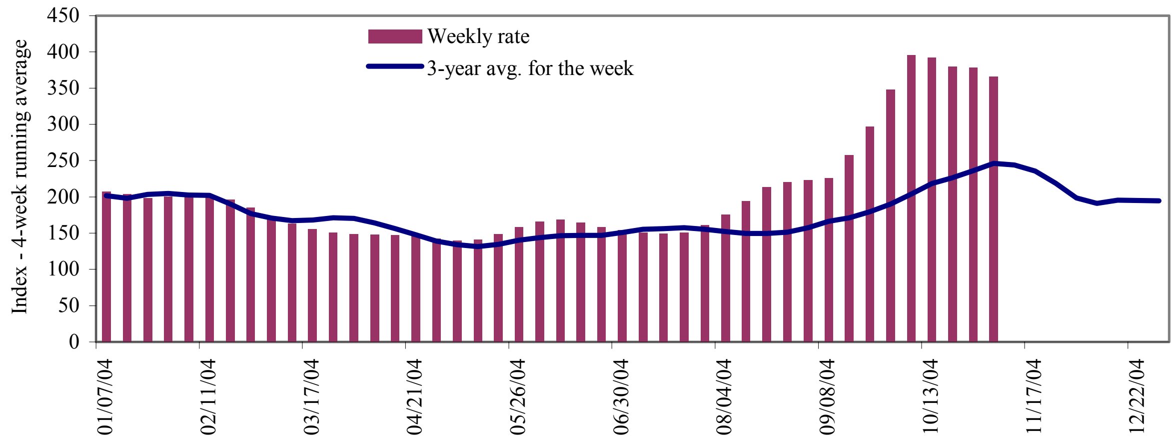
*A unit train refers to shipments of at least 52 cars. Shuttle train rates are available for qualified shipments of more than 100 cars that meet railroad efficiency requirements.

**Approximate load per car = 100 short tons: corn 56 lbs./bu., wheat & soybeans 60 lbs./bu.

Sources: www.bnsf.com, www.cpr.ca, www.csx.com, www.uprr.com

Barge Transportation

Figure 5
Illinois River barge rate index - quotes



Note: Index = percent of tariff rate
Source: Transportation & Marketing Programs/AMS/USDA

The **Illinois River barge rate index** averaged 183 percent of the **benchmark tariff rates** between 1999 and 2001, based on weekly market quotes. The **index**, along with **rate quotes** and **futures market** bids are indicators of grain transport supply and demand.

Table 8--Barge rate quotes: southbound barge freight

Location	11/3/2004	10/27/2004	Dec '04	Jan '05
Twin Cities	374	382	0	0
Mid-Mississippi	356	396	0	0
Illinois River	369	423	261	245
St. Louis	317	368	196	189
Lower Ohio	312	368	222	202
Cairo-Memphis	272	276	189	180

Index = percent of tariff, based on 1976 tariff benchmark rate
Source: Transportation & Marketing Programs/AMS/USDA

Calculating barge rate per ton:
(Index * 1976 tariff benchmark rate per ton)/100

Select applicable index from market quotes included in tables on this page. The 1976 benchmark rates per ton are provided in map (see figure 6).

Note: The Illinois barge rate is for Beardstown, IL, La Grange Lock & Dam (L&D 8).

Figure 6
Benchmark tariff rates

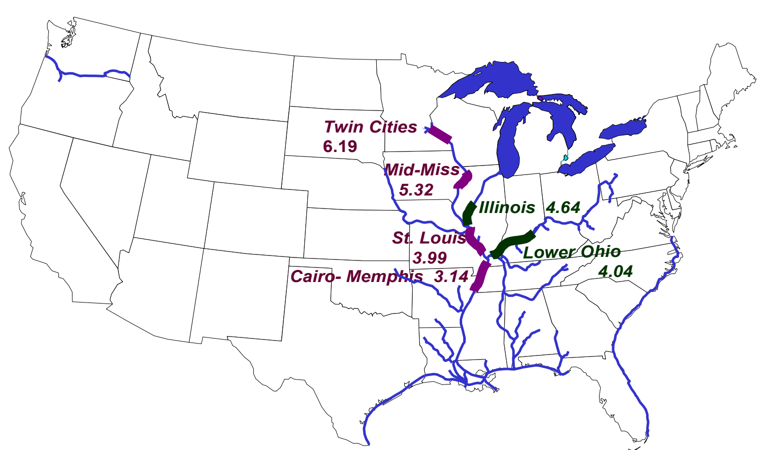
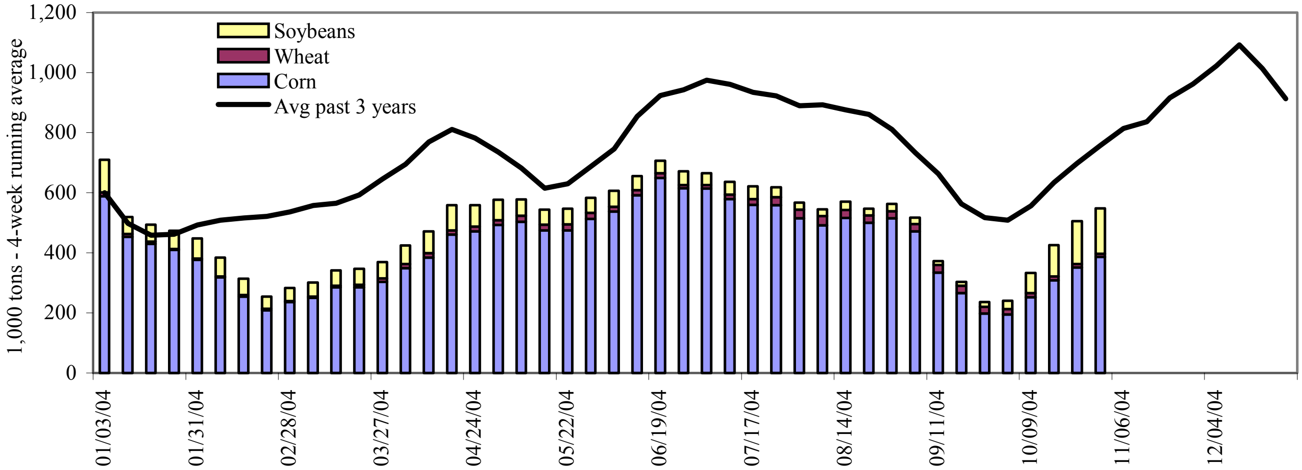


Figure 7

Barge movements on the Mississippi River (Lock 27 - Granite City, IL)



Source: Transportation & Marketing Programs/AMS/USDA

Table 9--Barge grain movements (1,000 tons)

Week ending 10/30/2004	Corn	Wheat	Soybean	Other	Total
Mississippi River					
Rock Island, IL (L15)	100	6	71	0	176
Winfield, MO (L25)	151	6	86	0	243
Alton, IL (L26)	354	9	104	0	468
Granite City, IL (L27)	369	9	104	2	484
Illinois River (L8)	192	0	16	0	208
Ohio River (L52)	56	3	47	6	112
Arkansas River (L1)	0	14	16	0	30
2004 YTD	21,172	2,448	4,057	631	28,308
2003 YTD	23,655	2,454	7,214	616	33,938
2004 as % of 2003 YTD	90	100	56	102	83
Total 2003	29,898	2,787	9,146	695	42,526

YTD (year-to-date) and calendar year total includes Miss/27, Ohio/52, and Ark/1. "Other" refers to oats, barley, sorghum, and rye.

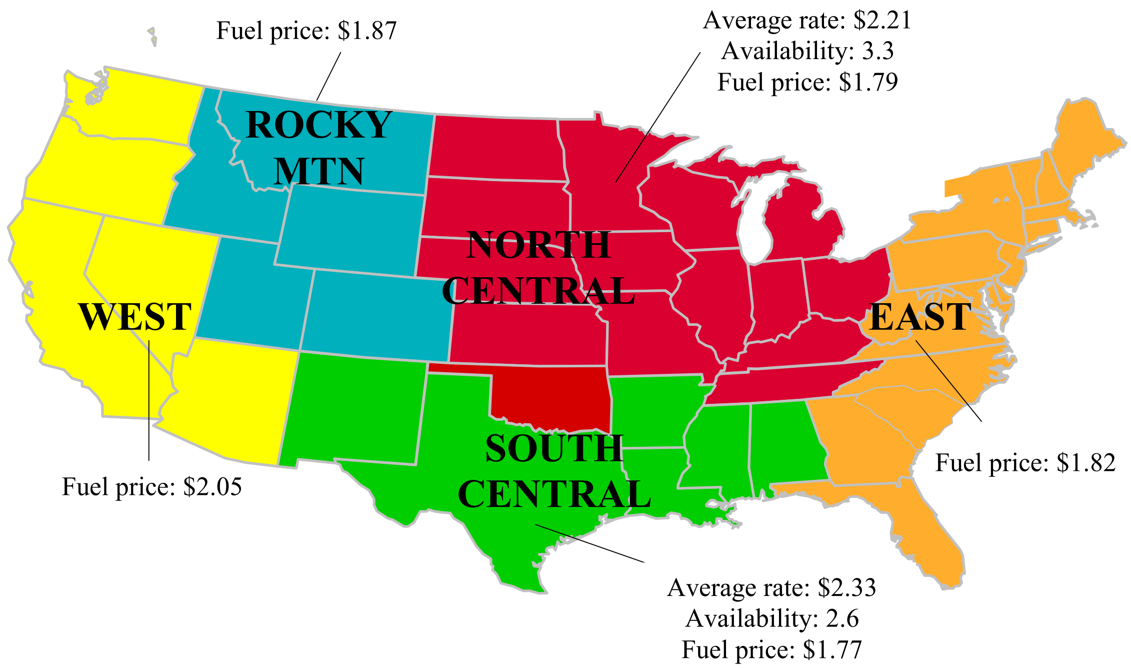
Source: U.S. Army Corp of Engineers (www.mvr.usace.army.mil/mvrimi/omni/webrpts/default.asp)

Note: Total may not add exactly, due to rounding

Truck Transportation

Figure 8

U.S. grain truck market advisory, 3rd quarter 2004*



*Average rate per loaded mile, based on truck rates for trips of 25, 100, and 200 miles
Note: Fuel prices are a quarterly average (unit per gallon)
Fuel price data source: Energy Information Administration, U.S. Department of Energy, www.eia.doe.gov

Table 10--U.S. grain truck market overview, 3rd quarter 2004

Region/commodity*	25 miles	100 miles	200 miles	Truck availability	Truck activity	Future truck activity
				Rating compared to same quarter last year		
	Rate per mile			1=Very easy to 5=Very difficult	1=Much lower to 5=Much higher	
National average[1]	**2.76**	**2.12**	**1.87**	**3.1**	**3.4**	**3.2**
North Central region[2]	2.76	2.02	1.86	3.3	3.3	3.3
Corn	2.90	2.15	2.18	2.8	2.9	3.1
Wheat	2.43	1.92	1.68	3.6	3.5	3.3
Soybean	2.90	2.15	2.18	2.9	2.9	2.9
South Central region[2]	2.97	2.14	1.87	2.6	3.8	2.9
Corn	2.32	2.12	1.76	3.0	3.8	3.0
Wheat	3.07	2.05	1.81	2.7	3.8	3.0
Soybean	3.35	2.26	2.05	2.2	3.6	2.6

Rates are based on trucks with 80,000 lb weight limit

*Commodity averages based on truck rates for top producing states based on National Agricultural Statistics Service/USDA

[1]National average includes: AR, CO, IA, IL, IN, KS, LA, MN, MS, ND, NE, OH, OK, OR, SD, TX, and WA.

[2]Commodity rates per mile include the average of the top 3 producing states within the region.

Source: Transportation and Marketing Programs/AMS/USDA

The weekly **diesel price** provides a proxy for trends in U.S. truck rates. Diesel fuel is a significant expense for truck grain movements, accounting for 37 percent of the estimated variable cost.

Table 11--Retail on-highway diesel prices*, week ending 11/08/04 (US$/gallon)

			Change from	
Region	**Location**	**Price**	**Week ago**	**Year ago**
I	East Coast	2.182	-0.030	0.711
	New England	2.296	-0.034	0.717
	Central Atlantic	2.278	-0.029	0.701
	Lower Atlantic	2.130	-0.031	0.715
II	Midwest	2.123	-0.049	0.656
III	Gulf Coast	2.096	-0.051	0.673
IV	Rocky Mountain	2.248	-0.028	0.709
V	West Coast	2.324	-0.046	0.745
	California	2.386	-0.045	0.757
Total	U.S.	2.163	-0.043	0.687

*Diesel fuel prices include all taxes.

Source: Energy Information Administration/U.S. Department of Energy (www.eia.doe.gov)

Grain Exports

Table 12--U.S. export balances (1,000 metric tons)

	Wheat						Corn	Soybeans	Total
Week ending 1/	HRW	SRW	HRS	SWW	DUR	All wheat			
10/28/2004	1,596	506	1,314	865	100	4,381	9,340	7,408	21,129
This week year ago	2,220	550	998	576	147	4,490	10,207	11,392	26,089
Cumulative exports-crop year 2/									
2004/05 YTD	4,186	1,968	3,518	2,261	267	12,200	7,254	5,367	24,821
2003/04 YTD	5,065	1,771	2,968	1,827	541	12,172	7,346	4,862	24,380
2004/05 as % of 2003/04	83	111	119	124	49	100	99	110	102
2003/04 Total	12,697	3,785	6,928	4,889	1,053	29,353	47,704	24,102	101,159
2002/03 Total	6,896	2,899	6,645	3,517	720	20,677	39,646	28,908	89,231

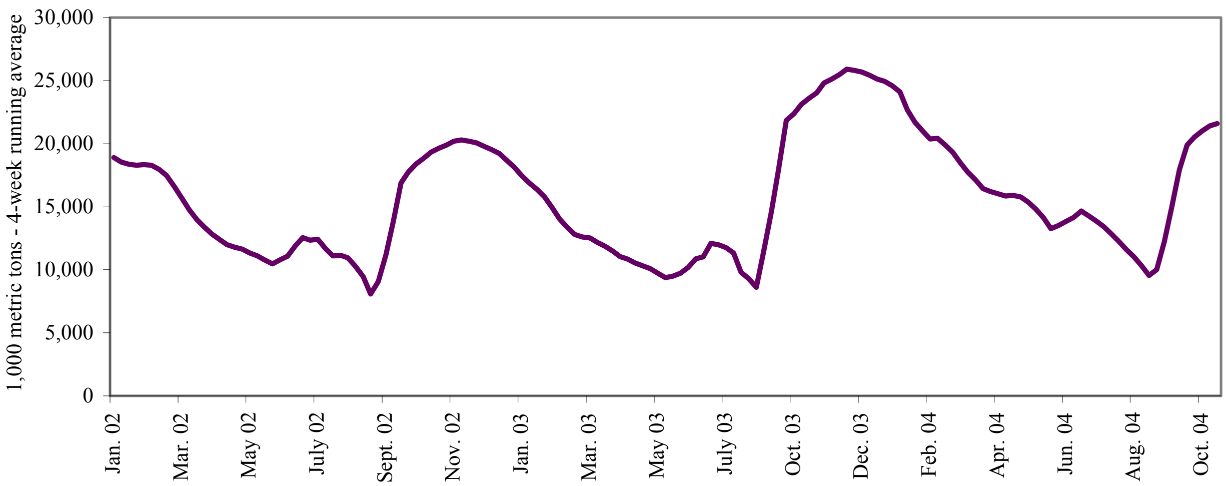
Note: YTD = year-to-date. Crop year: wheat = 6/01-5/31, corn & soybeans = 9/01-8/31, 1/ = Current outstanding unshipped export sales to date

2/ = New crop year in effect for corn and soybean sales

Source: Foreign Agricultural Service/USDA (www.fas.usda.gov)

Figure 9

U.S. grain, unshipped export balances (wheat, corn, and soybean sales)



Source: Foreign Agricultural Service/USDA (www.fas.usda.gov)

Table 13--Select U.S. port regions - grain inspections for export (1,000 metric tons)

	Pacific Region			Mississippi Gulf			Texas Gulf			Port Region total		
Week ending	Wheat	Corn	Soybeans	Wheat	Corn	Soybeans	Wheat	Corn	Soybeans	Pacific	Mississippi	Texas
11/04/04	247	154	222	47	956	0	190	10	0	623	1,003	200
2004 YTD	10,498	8,442	3,346	6,418	28,001	9,935	7,098	62	18	22,285	44,355	7,178
2003 YTD	7,697	4,482	4,149	5,288	25,815	15,085	5,773	114	44	16,328	46,189	5,931
2004 as % of 2003	136	188	81	121	108	66	123	54	42	136	96	121
2003 Total	8,764	5,450	5,141	5,883	30,903	19,374	7,011	229	69	19,355	56,160	7,309

Source: Federal Grain Inspection Service/USDA (www.usda.gov/gipsa); YTD: year-to-date

The United States exports approximately one-quarter of the grain it produces. On average, it includes nearly 45 percent of U.S.-grown wheat, 35 percent of U.S.-grown soybeans, and 20 percent of the U.S.-grown corn. Over 60 percent of these U.S. export grain shipments departed through the Mississippi Gulf region in 2003.

Figure 10

U.S. grain inspected for export (wheat, corn, and soybeans)

Source: Federal Grain Inspection Service/USDA (www.usda.gov/gipsa)

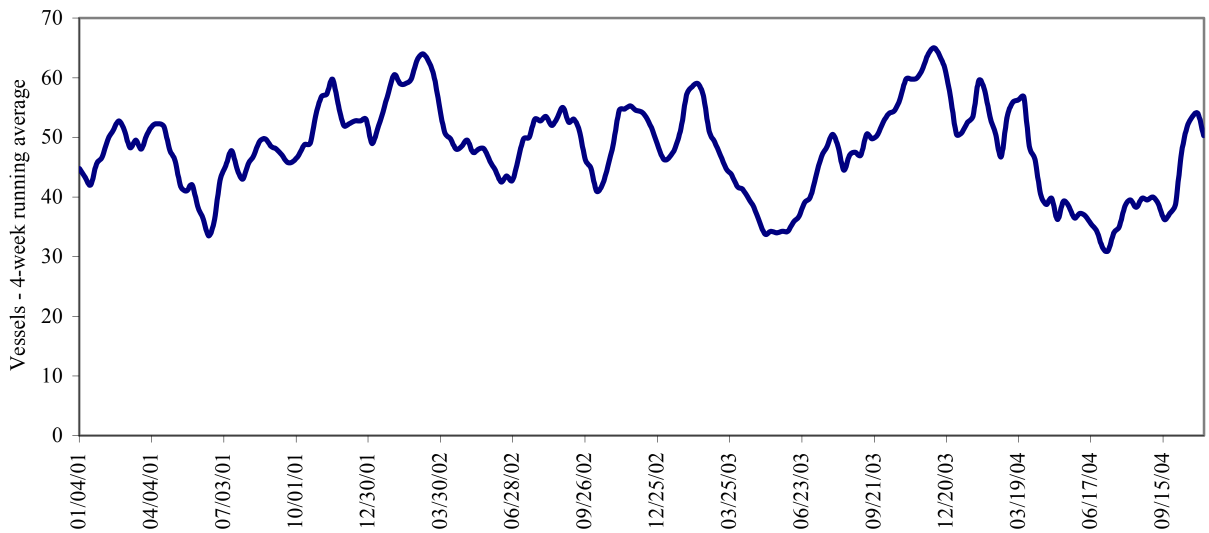
Ocean Transportation

Table 14--Weekly port region grain ocean vessel activity (number of vessels)

	Gulf			Pacific Northwest	Vancouver B.C.
Date	In port	Loaded 7-days	Due next 10-days	In port	In port
11/4/2004	43	51	64	12	12
10/28/2004	27	50	71	7	8
2003 range	(11..47)	(30..76)	(39..93)	(3..13)	(1..15)
2003 avg.	31	49	62	9	6

Source: Transportation & Marketing Programs/AMS/USDA

Gulf Port grain vessel loading (past 7 days)



Source: Transportation & Marketing Programs/AMS/USDA

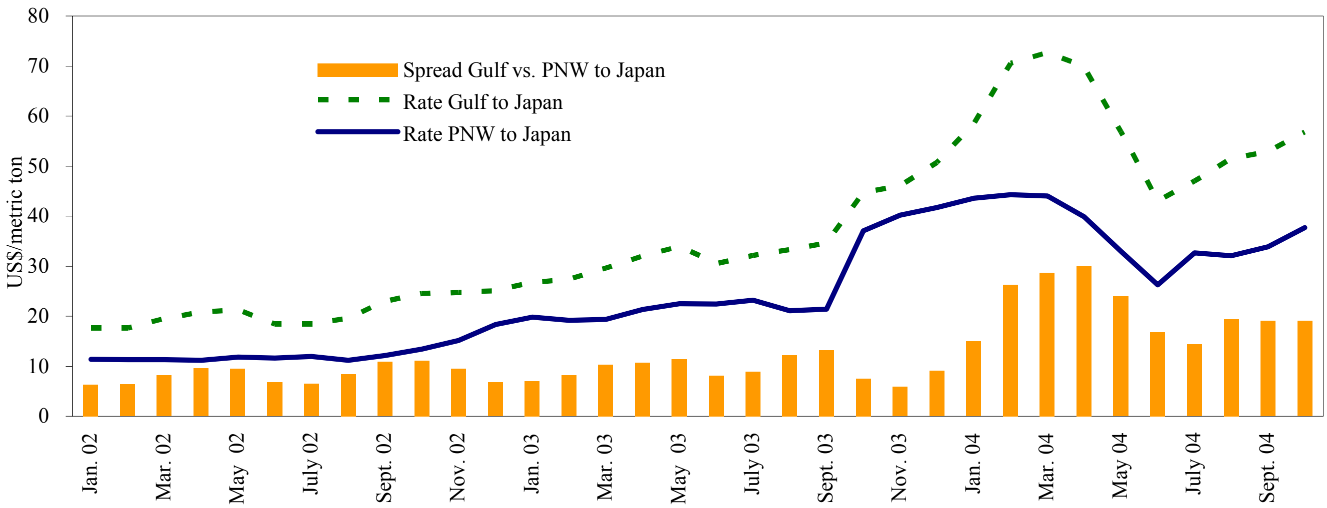
Table 15--Quarterly ocean freight rates (average rates & percentage changes) (US$/metric ton)

Countries/ regions	2004 3rd qtr	2003 3rd qtr	Percent change	Countries/ regions	2004 3rd qtr	2003 3rd qtr	Percent change
Gulf to				**Pacific NW to**			
Japan	$50.08	$33.83	48	Japan	$37.00	---	---
China	$54.00	$34.00	59				
N. Europe	---	$22.88	---	**Argentina/Brazil to**			
N. Africa	---	$25.50	---	Med. Sea	$46.92	$24.50	92
Med. Sea	---	$24.88	---	China	---	$34.75	---

Source: Maritime Research, Inc. (www.maritime-research.com)

Figure 12

Grain vessel rates, U.S. to Japan



Source: Baltic Exchange (www.balticexchange.com)

Table 16--Ocean freight rates for selected shipments, week ending 11/06/04

Export region	Import region	Grain	Month	Volume loads (metric tons)	Freight rate ($/metric ton)
U.S. Gulf	Ecuador*	Wheat	Nov 15/25	21,000	52.93
U.S. Gulf	Japan	Hvy Grain	Nov 25/30	54,000	59.00
U.S. Gulf	Algeria	Corn & Meals	Oct 24/26	20,000	54.75
U.S. Gulf	China	Hvy Grain	Oct 25/31	57,000	52.25
U.S. Gulf	China	Hvy Grain	Nov 1/10	55,000	57.50
U.S. Gulf	China	Hvy Grain	Nov 5/15	57,000	55.00
U.S. Gulf	Tanzania*	Maize	Oct 25/Nov 4	28,100	65.00

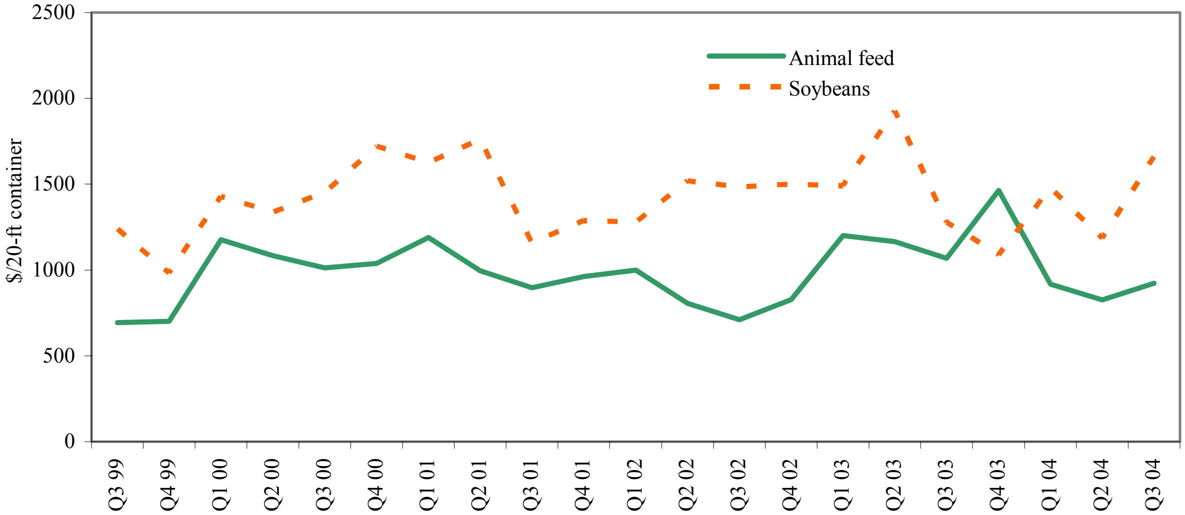
Rates shown are for metric ton (2,204.62 lbs. = 1 metric ton), F.O.B., except where otherwise indicates; op = option

*Most food aid from the United States is required to be shipped on U.S. flag vessels. The vessels are limited in availability resulting in higher rates. In addition, destinations receiving food aid generally lack adequate port unloading facilities, requiring the vessel to remain in port for a longer duration than normal.

Source: Maritime Research Inc. (www.maritime-research.com)

Figure 13

Weighted average rates[1] for containerized shipments of animal feed and soybeans to selected Asian countries



[1]Animal Feed: Busan-Korea (15%), Kaohsiung-Taiwan (21%), Tokyo-Japan (39%), Hong Kong (22%), Bangkok-Thailand (3%) and soybeans: Busan-Korea (5%), Keelung-Taiwan (31%), Tokyo-Japan (64%)

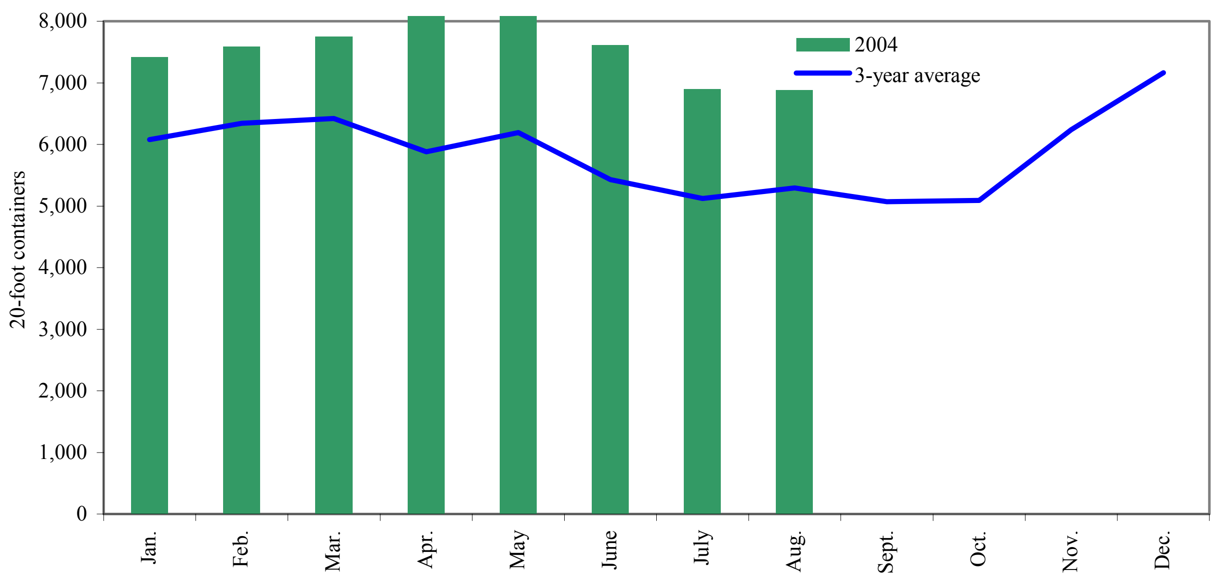
Quarter 3, 2004.

Source: Ocean Rate Bulletin, Transportation & Marketing Programs/AMS/USDA

Container ocean freight rates – average rate per twenty-foot equivalent unit (TEU) weighted by shipping line market share and trade route.

Figure 14

Monthly shipments of containerized grain for 2004 compared with a 3-year average



Note: PIERS data is available with a lag of approximately 40 days

Source: Port Import Export Reporting Service (PIERS), *Journal of Commerce*

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Agricultural Container Indicators	http://www.ams.usda.gov/tmd2/agci/
Ocean Rate Bulletin	http://www.ams.usda.gov/tmd/Ocean/index.asp